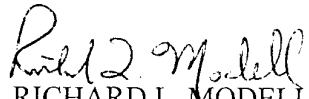IN REPLY
REFER TO

Logistics ED1 IPT

July 14, 1999

MEMORANDUM FOR: DISTRIBUTION

SUBJECT: Adoption of Commercial EDI Standards for DoD Logistics Business
Transactions • Integrated Product Team (IPT)

The **next** meeting of subject IPT **will** commence at 0900 on September 8, 1999 at
the Logistics Management Institute (LMI), McLean, VA. The primary focus of this
meeting **will** be to review comments received as a result of formal Service and Agency
staffing of the implementation plan (see Web site www.log.edi.migration.hq.dla.mil for
general IPT information). Attached for your review and comment are draft minutes and
actions that resulted from the June 25, 1999 meeting. Subject to comment, the IPT
Chairman will approve these minutes and actions on September 8, 1999. Point of contact
is Mr. George Kingsley, (703) 767-0068, george_kingsley@hq.dla.mil.

RICHARD L. MODELL
Lt Col, USAF
IPT Chairman

Attachments:
1. Minutes of Meeting
2. Attendees
3. Action Items

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Intelligence (ASD)
Deputy Under Secretary of Defense for Logistics (LSM), (MDM), (TP), (MPP&R)
Director, Joint Electronic Commerce Program Office (CTC), (PTI)

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Minutes
Adoption of Commercial EDI Standards for DoD Logistics Business Transactions
Integrated Product Team (IPT)
June 25, 1999

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Welcome, meeting overview, and administrative remarks: The meeting commenced with the Chairman thanking everyone for attending. Administrative announcements, introductions, and a review of the agenda were shared with the attendees.

Note: The purpose of this meeting was twofold; first, to review specific comments that IPT members had relative to the draft implementation plan and second, determine if the plan was ready for formal staffing. To that end, a verbatim transcript was maintained relative to members' specific comments. These comments will be reflected in the next iteration of the plan. The intent of these minutes is to provide a general overview of the conduct of the meeting and issues discussed.

Implementation Plan review: The Chairman conducted an extensive review of the plan less appendices. He began this review by stating that administrative issues such as grammar, punctuation, spelling, and format would be corrected through a detailed edit yet to be accomplished. He stated that his primary concern was concepts and that he was determined to remain true to the implementation concepts agreed to by the IPT. Summarized below are the highpoints of this review:

- **Executive summary:** After a short discussion on the plan's executive summary, the Chairman suggested that it should be strengthened to be more "hard hitting." He was concerned that the executive summary of any document is simply that and as this plan is to be distributed at the executive level of the Department, we should ensure it carries a strong and decisive message -- especially for those who only read this portion of the plan.

- **Implementation actions and reports:** The IPT agreed that actions and reports reflected in the plan should be consolidated into one or more easy-to-follow matrices or tables. Simply stated, they want the plan to clearly state what is required and when.

- **Approving signature:** After a short discussion regarding who will sign out the final implementation plan, the Chairman stated the Director, JECPO will forward the final plan to the DUSD(L) and the CIO for joint signature/approval. He further agreed to revisit this issue with the DUSD(L)(LSM) and determine if there was support for having the USD(A&T) approve the plan.

- **General:**
  - Words such as will, must, and mandatory will be individually reviewed to determine their appropriateness.
  - Final plan will read consecutively as opposed to each section standing alone.
  - Extensive redundancies will be reviewed and eliminated.

- Y2K management oversight mechanism will be reviewed to determine its applicability to the DLMS implementation.
- Estimated corporate implementation costs must be included.
- JITC will be reinserted.
- Final plan will include an electronic reference to the approved EB/EC guidance and policy memorandum.
- Consistency in numbering between sections will be reviewed.
- Consistency of terms such as "strategy" as opposed to "approach" will be reviewed.
- Goal is to electronically staff final plan in order to reduce reproduction time and cost.

The review concluded with the IPT agreeing that, in concept, the plan is ready for formal staffing, but did require extensive editing. The Chairman agreed and stated that he would have the IPT support group revisit the plan from that perspective. He stated that it was his intent to have the plan distributed for formal staffing as soon as possible, but would provide the IPT membership an advance copy prior to its release.

Wrap-up: The meeting concluded with the Chairman thanking everyone for their attendance.

Attendees
Adoption of Commercial EDI Standards
DoD Logistics Business Transactions, IPT, June 25, 1999

Army	*Navy*	*Air Force*	*USMC*
Mr. Carey		Ms. Larson	Ms. Matsumoto
Ms. Akins		Mr. Carlson	
NSA	*DLA*	*TRANSCOM*	*DLIS*
Mr. Nobles	Ms. Broussard	Mr. Creedon	Mr. Behrendt
		LTC Black	
DFAS	*DSCA*	*NIMA*	*Acq Reform*
Ms. Abejuela	Mr. Freedenthal	Mr. Strong	MAJ Hoeferkamp
Ms. Hughes	Mr. Goldstein	Mr. Sibbet	
	Ms. Taylor		
JTAV			*DLMSO/JECPO*
Mr. Soechtig			Lt Col Modell
			Mr. Obey
			Ms. Savage
			Ms. Johnson
			Mr. Thomas
			Mr. Egan
			Mr. Crawford
			Ms. Amyx
			Mr. Kingsley
			Mr. Gower
			Mr. Lewis
			Mr. St. Mark
			Mr. L. Johnson

Attachment 2

Action List
Adoption of Commercial EDI Standards
DoD Logistics Business Transactions, IPT

Number	*Action/Comments*	*Suspense*	*Lead*
1-20-99-01	**Approve IPT Charter** - • IPT members will review and provide comments by 2/5/99 to Mr. Jim Lewis (project facilitator). Mr. Lewis will incorporate changes as appropriate and brief for approval at the 2/9-10/99 IPT meeting. • Incorporate changes received during previous staffing and during meeting. Post to WEB with suspense for input by 3/1/99. Present for signature to Director JECPO and DUSD(L)(LSM). Include as a briefing point at the 3/5/99 LIB. • DUSD(L)(LSM) signed Charter 3/8/99. Director JECPO signed Charter 3/12/99. Signed Charter posted to WEB.	Completed	Chairman
1-20-99-02	**Approve IPT Terms and Definitions** - • Mr. Lenny Johnson (project facilitator) will modify current terms and definitions to include source information by 1/21/99 and provide to IPT membership via the IPT web site. IPT members will review and provide comments by 2/5/99 to Mr. Johnson. Mr. Johnson will incorporate changes as appropriate and brief for approval at the 2/9-10/99 meeting. • Will continue to update IPT membership through WEB and during meetings. - Will review Charter, Plan Outline, and Policy to ensure completeness of document. - Will transition to become "glossary of terms" in final Implementation Plan. • IPT Chairman will define the term DLMS to encompass other emerging EB/EC methods that may have future application to the overall EDI effort.	Ongoing Ongoing Completed	Chairman

1-20-99-03	**Approve Implementation Plan Outline** -	Completed	Chairman
	• Mr. Mark Crawford (project facilitator) will modify current Implementation Plan Outline with a sentence or two for each major heading and provide to IPT members by 1/28/99. IPT members will review and provide comments by 2/5/99 to Mr. Crawford. Mr. Crawford will brief for approval at the 2/9-10/99 meeting.		

	• Chairman will assign Action Group leads for developing the following sections of the Implementation Plan:
	 • Part 1-Introduction
	 • Part 2 – DLMS Implementation Plans
	    • New Systems (separate group)
	    • Legacy Systems (separate group)
	 • Part 3 – Implementation Management Plans
	 • Part 4 – Operation Management Plans
	 • Appendix A – Operating Concept
		Completed	

	• Tasking will include a "data call" for each of the Services and DLA to identify by name Action Group leads and support members for each formed Action Group. In addition, Chairman will name IPT Support Group facilitator(s) for each Action Group.	Completed	
	• Follow-up request sent to Services and Agencies for names of Action Group members.	Completed	
1-20-99-04	**Service and Agency EDI Briefings** - • Briefings will be provided in accordance with outline provided in administrative portion of the minutes above. Briefings by other IPT participants are optional. Time will be provided on the agenda to accommodate this option.	Completed	Services and Agencies

1-20-99-05	**DoD Logistics EDI Policy** - • IPT members will review and provide comments by 2/5/99 to Mr. Jim Lewis (project facilitator). Mr. Lewis will incorporate changes as appropriate and brief for review at the 2/9-10/99 IPT meeting.	Completed	Chairman
	• Chairman will consolidate inputs, revise policy, and brief to DUSD(L)(LSM) for approval.	Completed	
	• Will research to determine preferred method to promulgate policy.	Completed	
	• Draft policy delivered to DUSD(L)(LSM) 3/8/99	Completed	
1-20-99-06	**Candidate Program/Project Funding Nominations**- • IPT members will review and provide comments by 2/5/99 to Mr. Frank St. Mark (project facilitator). Mr. St. Mark will incorporate changes as appropriate and brief for review at the 2/9-10/99 IPT meeting. Based on comments and follow-on issues, Mr. St. Mark will continue to move toward final resolution/approval of programs/ projects by 3/18-19/99.	Completed	Chairman
	• IPT approved criteria with minor comments 2/10/99. Mr. St. Mark will revise criteria and issue a "data call" for nominations 2/12/99. This data call will include available funds by appropriation. Suspense for nominations will be 3/1/99. Action Group will convene 3/2-3/99 and develop a prioritized listing of nominations for presentation at the 3/4/99 IPT meeting.	Completed	
	• Prioritized listing, including new nominations received after original submission suspense was extended, will be presented to IPT 3/18-19/99	Completed	
	• Final list of approved FY99 projects presented to IPT 4/22/99.	Completed	

1-20-99-07	**IPT Voting Members** - • Chairman will revisit (based on IPT comments) the issue of IPT voting membership and reflect his findings in the next iteration of the IPT Charter.	Completed	Chairman
1-20-99-08	**DoD EDI Translator Requirements** - • Pending appointment of an "action group," IPT Chairman will begin to define/scope the DoD EDI translator requirement. This issue is inclusive of Corporate/Service/Agency requirements.	Completed	Chairman
	• 2/10/99 DLA and DISA agreed to co-chair an Action Group to define and begin the process of requirement determination.	Completed	
	• Mr. St. Mark will facilitate this action as a sub-task of the Action Group charged with developing Appendix B of the Implementation Plan.	Completed	
1-20-99-09	**IPT Non-DoD Issue Resolution -** • Develop a procedure, based on the fact that the IPT's primary focus is on DoD EDI standards, on how non-DoD (GSA, NSA, NASA, etc.) elements will assist in issue resolution.	Completed	Chairman
1-20-99-10	**Civil Sector IPT Involvement -** • Develop a procedure by which civil sector EDI standards organizations can participate, advise, and consult on the IPT's efforts**.**	Ongoing	Chairman
1-20-99-11	**DLMS/DLSS Enhancements -** • Mr. Don Egan will prepare a comprehensive list of enhancements that are present in DLMS, but not in DLSS. This list will be provided to the Chairman by 2/5/99 for review and briefed at the 2/9-10/99 meeting. • Briefing given at 3/4/99 meeting	Completed	Chairman
1-20-99-12	**NASA and USPS -** • For participation in the 2/9-10/99 meeting, the Chairman will invite NASA, USPS, and DIA to participate in the IPT process.	Completed	Chairman

Attachment 3

2-9-99-01	**DoD ROI Studies –** • Research to determine relevant DoD logistics EDI ROI studies completed/ongoing/ contemplated and provide results to IPT	Ongoing	Chairman
2-9-99-02	**DoD Logistics priorities –** • Research to determine the relative priority of EDI migration to commercial standards within DUSD(L).	Completed	Chairman
2-9-99-03	**Migration Standard Capabilities –** • Research, compare, contrast capabilities of XML vice ANSI ASC X12, or other available logistics standards, and provide results to IPT. White paper is posted on the IPT web site.	Completed	Chairman
2-9-99-04	**IPT E-Mail Address -** • Establish an IPT "common" e-mail address. • Address established. edi_ipt@hq.dla.mil	Completed	Chairman
2-9-99-05	**IPT End-State –** • Research to determine a definitive "end-state" for EDI IPT. • IPT terminates with completion of Service/Agency implementation plan.	Completed	Chairman
2-9-99-06	**Similar Efforts –** • Research to determine if similar efforts are ongoing within DoD/Non DoD Agencies. When applicable, add link to IPT WEB page.	Ongoing	Chairman
2-9-99-07	**"Oversight Organization" –** • In what will become a recommendation of the IPT, conceptualize and propose the "oversight organization" that will serve as the follow-on to this IPT. Major responsibility will be to oversee execution of Implementation Plan.	Ongoing	Chairman
2-9-99-08	**IPT Scope –** • Assess the ramifications of expanding the implementation plan to include other enablers such as AIT, XML, e-mall etc. This action can be accomplished through the re-definition of DLMS. DUSD(L)(LSM) will be briefed on the positives and negatives of this expansion. Results will be presented at the 3/4/99 IPT meeting.	Completed	Chairman

2-10-99-01	**Other Implementation Plans/Policies –** • Research to determine other plans, strategies, policies, lessons learned, etc., that should be referenced or tied to this effort.	Ongoing	Chairman
2-10-99-02	**Testing –** • Research and develop a strategy to determine future IPT testing requirements and test agencies to be utilized (Service and/or JITC). • Services/Agencies responsible for internal testing. JITC will oversee corporate testing requirements.	Completed	Chairman
3-4-99-01	**Training -** • Subject to request the IPT Chairman is willing to provide training on DLSS, DLMS, or other IPT-related topics for individuals or Service/Agency groups.	Ongoing	Chairman
3-4-99-02	**Agenda Topics -** • Establishment of a mechanism for IPT membership to request agenda topics for future meetings. • Added to WEB page 3/5/99.	Completed	Chairman
3-4-99-03	**Coordination -** • Coordination with the U.S. State Department and U.S. Customs Office as the IPT process moves forward. • Chairman emailed U.S. Customs POC 3/11/99 inviting their participation in the IPT.	Completed	Chairman
4-22-99-01	**EDI/AIT -** • Develop AIT information paper that provides IPT with recommendation on how IPT should proceed in light of current AIT development. • Added to IPT Web site 5/26/99	Completed	Chairman
4-22-99-02	**Fundamental DLMS Briefing –** • Develop a briefing with focus on what is in place to support Service and agency program managers as they implement DLMS. • Incorporated into Implementation Plan	Completed	Chairman

4-22-99-03	**Security Recommendation –** • Develop an IPT security recommendation for the use of DLMS. • Briefed to IPT 5/27/99	Completed	Chairman
4-22-99-04	**Electronic Commerce Warehouse (ECW)** - • Develop an "ECW white paper". Paper should outline background, current capability, applicability and vision of the future to include security ramifications. • "ECW white paper posted to web 6/23/99.	Completed	DISA
5-27-99-01	**Implementation Plan Costing –** • IPT support group will continue to research to determine DRID#48 cost criteria that support the cost of EDI implementation.	Ongoing	Chairman
5-27-99-02	**Service and Agency Implementation Cost –** • Cost be included as an integral element of Service and Agency implementation plans. The IPT support group will review cost requirements for the Service and Agency plans and report their results at the next meeting. • Service and Agency cost will be included in plans.	Completed	Chairman
5-27-99-03	**Training and risk management requirements** • The IPT support group will review and expand the training and risk management sections of Appendix E to be more explicit of corporate requirements.	Completed	Chairman

Attachment 3